ClubRunner

Rotary International integration introduction and overview

Omar S. - 2022-12-15 - Overview

IMPORTANT NOTE: Rotary International requires every member and entity make use of a unique email address. This means (for example) married members cannot make use of a single email address for the purposes of database integration.*

ClubRunner enabled automatic database integration with Rotary International on November 1, 2010. This means once this feature is turned on and the setup is complete, all member data updates (which your club chooses to share) will be automatically updated on Member Access at RI's Headquarter databases within minutes, without the need to send any email notifications or enter the data via rotary.org.

Prior to November 1, 2010, the database integration consisted of email notifications which were automatically generated by ClubRunner, but had to be sent by a club executive through the "Send Data Changes to RI" feature on ClubRunner. Note that the automatic integration replaces this feature.

In order to begin using this feature, there are two steps that need to be completed by your club:

1. Set ClubRunner as your View and Edit Club Management Vendor by using the attached guide. You can find the latest copy of the guide at MyRotary.org here: How to choose or change your club management vendor

2. Opt-in within your ClubRunner Site. You may find instructions on how to opt in to RI Integration, please see the following article: Opting in and out of RI Integration settings

   Note: Once you do this, ClubRunner will begin to transmit your member information updates to Rotary International as soon as any changes are made to your active or honorary members profiles, whether the change was made by the member or a club officer. When a club opts in for the first time, we reset all their member privacy preferences to opt in to ALL fields.

3. *During the setup, there may be a 24 hour delay from the time a club opts in (authorizes the vendor) to the time the authorization takes effect. Once the setup is complete, the member profile updates will take place within several seconds moving forward.*

Privacy Options by Member

This new integration feature also allows your individual members to customize their own privacy options by allowing them to select which fields they wish to share with Rotary International. The club privacy options override the member in terms of opting out of certain fields, so if the club chooses not to share cell phone numbers, all members will not share cell phones. However, if the club chooses to share home phones, certain members can decide to opt out of sharing home phones.

Importance of RI Member ID

It's important to note that the RI Member Number must be populated for all members in your club that you wish to integrate changes for. Effective November 11th, 2015 a service was implemented on ClubRunner to automatically populate the RI Member Numbers for all your members' ClubRunner profiles. You can access a list of any members that were not successfully matched for an RI Member ID by clicking on Missing RI Member ID Report under the Membership tab (For the district site, this would be found under the For Clubs section). To update these profiles manually, click on the View Profile link on the right to access their profile and then click on the Rotary tab, and there you can update their RI Member ID. This information can be found on the Rotary Member Access site.

Error Handling

At this time, new members, member updates, member terminations, club officer information, and club information are integrated with Rotary International. Should an error occur, ClubRunner will send an email to the club with the RI integration issues to be reviewed and resolved as required.

History of Updates

1. **Rotaract Integration available in beta (December 2, 2022)**
    - Rotaract clubs are now also eligible targets for Rotary Integration Services as a beta.
2. **Adding and Transferring Member Improvements (July 30, 2020).**
    - Clubs with integration enabled can now search the Rotary database first before adding new members, helping ensure that you link a Rotarian to their previous membership.
    - When adding a new member without a Rotary ID, we will perform an automation search in Rotary's database to locate potential matching users by their Email Address, and Name and Country.
3. **Compare and Sync for Executives (January 18, 2018).**
    - We now support compare and sync functions for club executives for Rotary tracked positions. You will be able to push synced positions to Rotary, or pull positions reported at Rotary into ClubRunner.
4. **Automatic Error Notification Discontinued (August 1, 2017).**
    - Rotary International requested ClubRunner to stop its automatic notification of errors from RI integration. Going forward, these notifications will be sent to the club's RI integration service contact to review and resolve as required.
5. **Honorary Members, Change of Member Type (Active to Honorary, Honorary to Active), Club Transfers, Date of Birth, Work Website, Classification, Sponsor, Club Info - Website, Phone Number, Fax, and Mailing Address (August 9, 2016).**
    - We now support all of these integrations. If any of these new integrations change on ClubRunner, the RI database will reflect the changes immediately. However, if there was an error, an email will be sent automatically to RI to have them change it manually, which could take up to 5 business days.
6. **Club Membership Chair Position (March 21, 2013).**
    - We now support the club Membership Chair as an integrated officer. As soon as this position is populated, the RI database will reflect this immediately, ensuring that this member will receive proper access as well as timely notifications regarding membership. For instructions on updating your club membership chair position, please read the article named How do I add a club Executive? For club websites, Add a club Executive or Director on district Page.
7. **Compare & Synchronize Member Data Fields (November 01, 2012).**
    - This new function will allow you to compare your member data information as it appears on

ClubRunner with what is available in Rotary Internationals' Member Access, giving you the option to push your member information directly from ClubRunner to Rotary International or pull your information from Member Access to populate your ClubRunner profile. Therefore, if you notice a member's profile was inconsistent between ClubRunner and RI, you can simply push or pull the specific field data between ClubRunner and RI. To learn more about how to sync member data fields, please read the article named How to use the Compare & Synchronize function for club websites or How to use the Compare & Synchronize Function on the district or How to use the Compare & Synchronize Function (district) for district administrators.

8. **RI Integration - Club Officer Information (December 15, 2011).**
    - Now available, club executive and officer information will update RI's databases in real time. This means that now, Clubs can define their club officers for 2012 - 2013 and the information will be reflected on RI's database in minutes! For instructions on updating your club executive and officer information, please read the article named How do I add a club Executive? for club websites or Add a club Executive or Director on district Page.

9. **Club Meeting Information (December 15, 2011).**
    - Now available, club information will update RI's databases in real time! Updates made to the club's meeting place as well as the meeting date and time will be reflected on RI's databases in minutes. For more information, please read the article named How to Update your club's meeting Information for club websites or View and Edit club Information for district websites.

10. **Terminations (October 20, 2011).**
    - Member Terminations are now included within the automatic RI Integration update. It no longer takes up to 2 weeks to complete. The process now updates within minutes. For more information, please read the article named How do I deactivate or delete an active member? for club websites or Deleting a club Member for district websites.

Attachments

- how_to_choose_or_change_club_management_vendor_en.pdf (506.46 KB)

Related Content

- How to use the Compare & Synchronize tool (District Executive)
- How to use the RI Integration Member Updates Archive (District Executive)
- What is the Club Updates Archive? (District Executive)
- Activating RI Synchronization on the District by a District Administrator
- How to use the Compare & Synchronize tool on the District
- How to use the RI Integration Member Updates Archive on the District
- Opting In & Out of RI Integration & RI Integration settings
- How do I use the Compare & Synchronize tool?
- What is the RI member update archive?
- What is the club updates archive?
- What is the difference between "Read Only" and "Read and Update" RI Integration